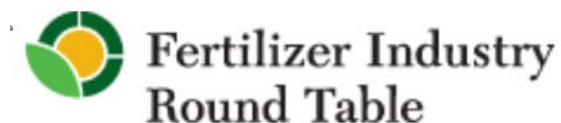


# THE FERTILIZER INDUSTRY IN EUROPE ... NOW AND IN THE FUTURE



**Pierre-François Dumas**  
Independent Consultant  
Former General Secretary  
European Independent Fertilizer Blenders  
and Distributors



# FOTC PRESENTATION

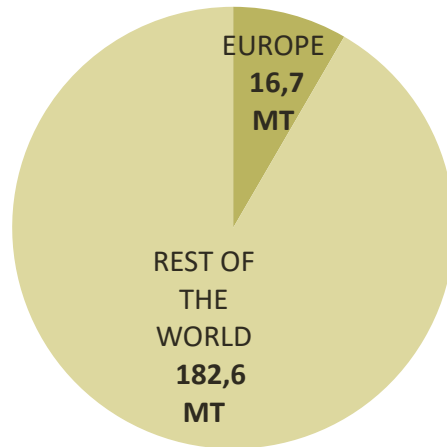
Pierre-François Dumas, FERTIMAP

# European Trends

## FIRT Presentation

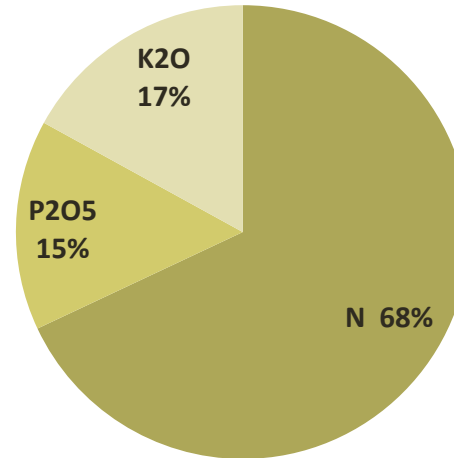
# Supply / Demand in Europe

- WORLD CONSUMPTION



Total 199,3 MT of nutrients

## EUROPEAN CONSUMPTION

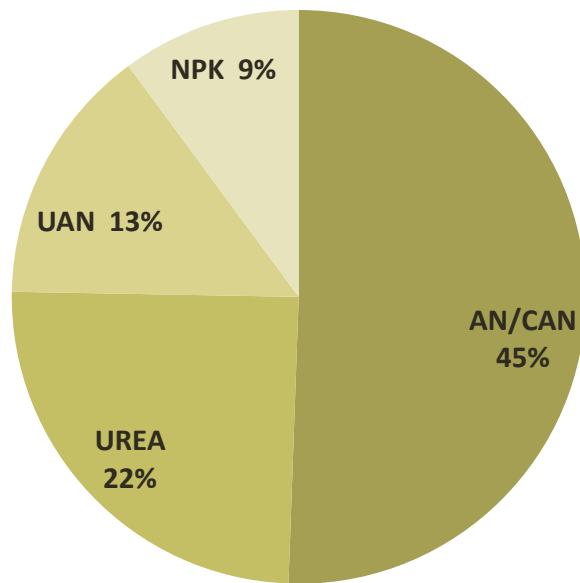


Total Europe 16,7 MT

### EUROPE IMPORTS

29% N , 60% P2O5 , 62% K2O

# Producers / Products in Europe



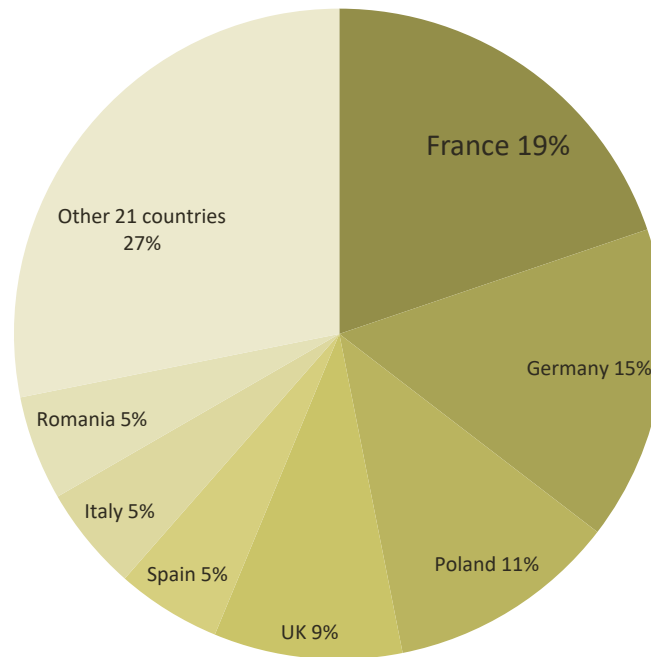
## MAIN EUROPEAN NITROGEN PRODUCERS

YARA  
BOREALIS  
OCI  
FERTIBERIA

## MAIN EUROPEAN POTASH PRODUCERS

KALI  
ICL

# Fertilizers consumption per countries in Europe



# Part 1

- Impact of Regulation
- 1-1 Regulation concerning the Environment
- 1-2 Regulation concerning Security
- 1-3 Regulation concerning Business Practices

# 1-1 Regulation concerning the environment

- 1-1-1 Air Regulation
- 1-1-2 Water Regulation
- 1-1-3 Soil Regulation

# 1-2 Regulation related to Security

1-2-1 Regulation on Precursors

1-2-2 Case of AN / CAN

1-2-3 Case of Ammonia

# 1-3 Regulation concerning Business Practices

1-3-1 Reach : Registration, Evaluation, Authorization and Restriction of Chemicals

1-3-2 New Regulation for fertilizers

1-3-3 Circular Economy : case of phosphate

# Part 2

- Impact of :
  - 2-1 Technical factors
  - 2-2 Economic factors
  - 2-3 Public perception factors

# 2-1 Impact on the Market of Technical Factors

2-1-1 Coated urea

2-1-2 Blended NPKs

2-1-3 Coated fertilizer with yeast, bacteria

# 2-2 Impact on the Market of Economic Factors

2-2-1 Fluctuation in Prices

2-2-2 Mergers of Producers

2-2-3 Mergers of Retailers

## 2-3 Public perception Factors

2-3-1 Fertilizers= Pesticides = Bad

2-3-2 People's incoherence : They want healthy products but do not want to pay the price

2-3-3 Examples : GMOs and shale gas production are massively rejected

# Part 3 : Business Reaction

3-1 Farmer's Reaction

3-2 Producer's Reaction

3-3 Retailer's Reaction

## 3-1 Farmer's reaction

3-1-1 Adaptation by using improved technology

3-1-2 Adaptation by extensive production

3-1-3 Adaptation by switching to organic farming

## 3-2 Producer's Reaction

3-2-1 Adaptation by using improved technologies

3-2-2 Adaptation by specialization

3-2-3 Adaptation by horizontal development

## 3-3 Adaptation at Retailer level

3-3-1 Adaptation by using improved technologies

3-3-2 Adaptation by specialization

3-3-3 Adaptation by horizontal development